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ABSTRACT

This instructors' manual represents the culmination of a development program in the area of application of anthropological theory and techniques to the field of education. It is intended to help prepare graduate students in anthropology and in educational administration as well as other researchers and practitioners to view schools as social systems. Another objective is to explicate an approach and a methodology for problem-solvers and policy-makers. The design of this training program represents a collective effort on the part of the field research team in: (1) selecting from the field notes and research findings of the study those concepts and materials most valuable to educational decision-makers; (2) developing a conceptual and curricular format that would make these materials both useful and interesting; (3) setting the materials within a problem-solving framework since this is the essence of the decision-making process; (4) field-testing and assessing the materials with practicing teachers; and (5) refining and redesigning the materials as a self-contained package. The materials are described in such a way that the student proceeds to look at the school as a social system in much the same way he would in a field study--beginning at the macro-level of the school as an organization and then gradually working down to study elements of that system in specific detail. (SK)

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STUDYING SCHOOLS AS SOCIAL SYSTEMS:

A MANUAL FOR FIELD RESEARCH IN EDUCATION

Instructors' Manual

Horace Mann-Lincoln Institute
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SP010 154

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Rationale

SSSS training materials for which this instructors' manual was prepared represents the culmination of a developmental program in the area of the application of anthropological theory and techniques to the field of education. Specifically, it is intended to help prepare graduate students in anthropology and in educational administration as well as other researchers and practitioners to view schools as social systems. An equally important objective is to explicate an approach and a methodology for problem identification and data seeking to inform problem solvers and policy makers. Ever since 1967, the Horace Mann-Lincoln Institute of Teachers College, Columbia University has been working on the application of field work methods to the study of education in the schools and in other educating institutions. The early phases of this developing program began with a number of evaluation studies in schools and since that time we have expanded to include work in a variety of educational settings from elementary to higher education. Five major premises have informed this developmental program:

1) Research in and evaluation of educational programs is a complex task which cannot be limited to the measurement and reporting of essentially quantitative outcomes for experimental and control groups using the pre- and post-testing model.

2) Research and evaluation of operational programs in educational settings requires a <u>field</u> rather than <u>laboratory</u> orientation which must seek its methodology from anthropology and sociology as well as psychology

and refine these mthods in an educational context. Moreover, educators and educational consumers--supervisors, teachers, pupils, and parents--must be involved at every stage along with educational specialists, for, in our view, the evaluation of educational programs is in many ways a unique process which must grow out of a fundamental understanding of education as well as competence in research.

3) We proceed from the assumption that while educational programs of the school and the community operate in the real world and thus cannot be manipulated in order to satisfy the canons of controlled experimentation, it is possible to be just as rigorous and just as empirical in field-oriented research and evaluation as in experimental approaches--if the objectives of research are clearly stated and if the methods for the collection of qualitative data are subjected to the same scrutiny and standardization as methods used in quantitative analysis.

4) We have developed a firm commitment to <u>institutional</u> as well as <u>individual</u> behavior modification as the basis for sustained and meaningful change in education.

5) Based on our own experiences as well as observation of a wide variety of social action programs, we are certain that unless such programs are developed out of and re-inform some body of theory, they inevitably fail to become institutionalized and so do not produce lasting change.

In the academic year 1971-72, members of this group along with other faculty and students at Teachers College, undertook a student-faculty seminar to look at how schools are organized. A social systems

perspective was taken as an alternative to the more traditional views of the school as (a) a series of teaching-learning encounters or (b) as a formal organization which responds to the same mode of organizational analysis as other institutional settings such as business or government. Specifically, we wanted to look at schools as behavioral institutions which operate according to an observable code of rules. In the sense that we were using the notion of "rules" here, we were describing a control mechanism, one which regulates and regularizes relationships between the "school" and the outside world as well as within it. It is this code of rules which keeps the school functioning as a social system and defines relationships within it. It also establishes who is an insider and who is an outsider. Control systems of this sort begin with values which define what is "good" and what is "bad," what is expected and what is condemned. Ultimately, however, social behavior in the school is guided by specific rules which attempt to operationalize these values and apply them to everyday situations. Thus, while values give us some general sense of what is expected, it is the rule which states what actions will be approved and which forbidden.

Taken as a totality, these rules form a code of behavior which members of the groups operating in these settings learn as members of these systems. The code of rules is manifest in their behavior since it defines the equation through which they perceive the objective world and make socially acceptable decisions about how to behave. Since we believe that this code of rules is the key to understanding how social systems operate in schools and other educational settings, the central question

addressed by the ethnographic record becomes "What is the code of rules which makes the high school a social system and how do we prepare people to play this game or to change the game." By observing, recording and analyzing these rules, we felt we could define the optimal behavioral structure of the high school.

We hypothesized that while educators have traditionally looked for these rules in the formal constitution of the school, they might better be found by observing the behavior which they produce in the school itself. The transformation of the high school, then, becomes a matter of communicating rules rather than re-formulating organizational charts.

We were also proposing that anthropology can make a major contribution to education by cooperating in the development of a conceptual framework and set of methods for problem identification and data seeking in actual field settings in education.

We also expected that the research would advance theory and method in anthropology. The necessity to generate social models which allow cross-cultural comparison is keenly felt in anthropology today. That such models may be used in the study of complex societies makes it even more essential that analytical tools such as network, set, and social field be developed and related to institutional contexts. A goal in this quest for new analytic tools has been to generate something that rivals kinship diagrams in simplicity and ease of description. We see education as a particularly attractive area in which anthropologists can pursue this search. In education we have a widespread opportunity to describe, analyze and compare a number of role relationships (teacher-pupil, pupil-

pupil, teacher-teacher) which have a wide enough occurrence for such comparative study.

Early in 1972, we decided to embark on a long-term research program which we felt could lead to a re-examination of how schools are organized as social systems rather than as formal or even informal organizations. Essentially, we planned to follow the steps outlined in Table I.

Table I

PHASE I April, 1972 - August, 1972
1. Development of Conceptual Framework (Seminar) 2. Development of Preliminary Methodology (Seminar) 3. Recruitment of Anthropologists (Seminar) 4. Selection of Field Settings
PHASE II August, 1972 - October, 1973
1. Field Research 2. Refinement of Conceptual Framework - and Development of Taxonomy 3. Testing 2nd Refinement of Methodology 4. Preparation of Type-Case Ethnographic Records and Comparative Mode for Anthropological and Educational Audiences
PHASE III (N.I.E. Grant) October, 1973 - June, 1975
1. Fieldwork in Field Site Schools and Communities 2. Preparation of Summaries of Individual School Ethnographies 3. Preparation of Provisional Training Materials for Educators 4. Field Testing of Materials with Practicing Educators 5. Redesign and Refinement of Training Materials 6. Second Phase Field Testing of Materials with Practicing Administrators 7. Final Design of Materials

We sought and received support from the Ford Foundation for these first two phases. In addition, we anticipated a third phase leading to the development of material and techniques for use in preparing educators and anthropologists involved in education; this later phase required successful completion of Phases I and II, and would be possible only if we had in fact been able to generate considerable interest on the part of both anthropologists and educators in looking at social organization in education.

In September of 1973, we received support from the National Institute of Education for Phase III--the preparation of training materials for educational administrators--and it is this portion of the developmental process which led to the development of these materials. Throughout our research, we saw our dissemination responsibilities as twofold. On the one hand, we felt the responsibility of reporting to colleagues in anthropology and education on the methodology and theoretical implications of the research. We have begun this process through a series of books, dissertations, journal articles, and panel presentations at a variety of professional society meetings. At the same time, however, we felt that our commitment to the principal that educational research should have at least the clear potential for informing the decisions made by practitioners required the development of some means of shortening the temporal gap between knowledge production and knowledge utilization. Thus we chose to spend the remaining portion of the program period developing training materials for educators as a major means of disseminating the research results from our studies. The design of this training program represented

a collective effort on the part of the field research team in (1) selecting from the field notes and research findings of the study those concepts and materials which we felt would be most valuable to educational decision makers; (2) developing a conceptual and curricular format which would make these materials both useful and interesting; (3) setting the materials within a problem solving framework since this is the essence of the decision making process; (4) field testing and assessing the materials with practicing educators; (5) refining and redesigning the materials as a self-contained package.

The first step in this process was to review at a series of total staff meetings the research findings and concepts and the materials and to select from these those "products" which we felt had most immediate interest and utility for practitioners while at the same time providing a vigorous and valid approach to studying the high school as a social organization. To do this we reviewed as a group all of our summaries and selected from among those categorized notes (1) incidents, (2) field notes, and (3) methodological procedures which we felt would best describe the social organization of the high school. Initially, we selected ten areas of structural integrity within the social organization of the high school:

1. You can't teach me because....
2. The One True Way of Learning
3. Contracts and Conflicts
4. Roles--Formal and Emergent
5. Bureaucratic and Organic Structures

6. My school is better than yours, administrative styles
7. Myth and ritual
8. Autonomy and Anonymity
9. School Size and Social Organization
10. Schools and Their Communities

From these ten, we narrowed the list down to three by combining some and by excluding others which we felt did not have the immediate impact which we felt was essential to a well-developed course program. We finally settled on a theoretical rationale which began by describing the study, its theoretical and methodological approach, and our own rationale for why it is important for practitioners in education to understand the high school as a social system. The basic principle here was that the process of problem solution in education requires a firm understanding of how to identify problems within the high school prior to attempting to apply some problem solving mode to the data. Problem solving in this sense is based upon the principle of problem identification in the ongoing daily life of the school. Here we established as an important guide the principle that education is a unique and complex field which can not be studied as an analogue of business or industry or government but has a unique field of social action which can be identified and subjected to observation and analysis with as much rigor as any other social field. From this flows the need to recognize that answers provided by anthropological research, regardless of the methodology, are usually going to be as complex and ambiguous as the questions raised by practitioners. In order to truly understand and reduce those questions to manageability,

it is necessary that we as researchers first learn to see the world as practitioners do in order to unders[illegible] the meanings of objects in their social field and to be able to identify the objects of central concern. Thus, throughout the materials we have attempted to establish points at which students using the materials can relate back to their own educational institutions. The basic curricular strategy which developed was to use the actual field notes themselves, unaltered except to change names of actors so as to insure anonymity to the three schools involved, as the basic materials for the materials. In selecting these materials, we constantly sought subject matter which was intellectually rigorous, analytic, formalizable and yet teachable. We then organized the materials according to a scheme which we felt best followed the natural process of problem identification: starting with the macro- level study of the community and its high school as a total system, then shifting to the study of specific roles within the school and the behaviors attendant to those rules and finally selecting a series of problems which we felt could be identified in this process.

Once the first provisional set of materials had been developed, we field tested those materials with a class of administrators, teachers, and graduate students in the social sciences at Teachers College, Columbia University as a regularly scheduled 15-week course carrying graduate credit during the spring term of 1975. On the basis of this first field test, we redesigned the materials and held a second field test with a new group of students similar to (and in some cases the same individuals) as in the first field test. This second field test was held during the first

six week summer session of 1975 at Teachers College, Columbia University. Some of the materials which eventually became parts of the assigned readings and the teachers' manual for the course materials were also tested in a faculty seminar for the department of Educational Administration which was held during the spring term of 1975.

At the conclusion of the field test the materials were redesigned and brought together as a complete instructional unit. In addition to the basic three unit set of materials themselves, they include a book of assigned and recommended readings, a teachers' manual, and a subsystem of ancillary and additional materials which attempt to relate the activity to the student's own educational setting. We propose that these materials can be used as a basic instructional module which can either stand alone as a graduate course or as a field-based workshop or can be incorporated into existing courses and, with some modification, can also be used as self-instructional materials.

The materials are designed to give the student as close a simulated experience of doing a field study of schools as we could include without sending them out into the field. The introduction to the materials explains how the course was developed, describes the research process by which the data for the materials was gathered and analyzed, and attempts to show how field research can serve educational administrators and other educators as a means of problem identification and data seeking for decision making. There is a bibliography and assigned readings after this and subsequent sections. In each case the readings are intended to inform the specific section of the materials with which they are

associated. We have divided them into two categories: (1) primary readings--those which we found were essential to understanding the materials and (2) secondary readings--those which we found to be helpful to students who wanted to pursue the major ideas and themes in each section.

In the second section of the materials we have tried to design the descriptions of the schools and their communities to follow in much the same way that a field ethnographer (or anyone interested in learning about schools and their communities, for that matter) would proceed. We have altered the names of the communities, the schools and the actors to insure the anonymity we pledged the schools when we began the study but all data and descriptive materials included here are factual.

The materials themselves are in three units which we have attempted to design in such a way that, here again, the student proceeds to look at the school as a social system in much the same way he would in a field study--beginning at the macro-level of the school as an organization and then gradually working down to study elements of that system in specific detail.

COURSE OVERVIEW

UNIT I, UNIT II

UNIT I BUREAUCRATIC AND ORGANIC STRUCTURES: A COMPARATIVE ANALYSIS OF THREE HIGH SCHOOLS

TOPIC	CONTENT BREAKDOWN	OBJECTIVES	RELATED INCIDENTS
I. Introduction	1. Historical background. 2. Characteristics of bureaucratic structures. 3. Characteristics of organic structures. 4. Sorting; territoriality; rule-making and rule-breaking (introductory material).	1. The student will discuss and utilize concepts presented in the Introduction to describe and differentiate a setting in terms of its bureaucratic and organic structures.	
II. Formal and Informal Authority Within the School	1. Discrepancy between lines of authority on the organization chart and observed patterns of control and influence. 2. Informal and formal communication channels--the control and relative power of each. 3. The sources of influence of informal leaders. 4. Overlap between formal and informal influence.	2. Given an incident, identify formal and informal leaders and the sources and varying strengths of their power.	7, 31, 44
III. Bureaucratic and Organic Influences on Sorting	1. Contrast between interaction patterns in formal and informal settings. 2. Influence of bureaucratic characteristics on interaction patterns (sorting). 3. Influence of organic characteristics on interaction patterns (sorting). a. organic residence b. out-of-school activities (common interests) c. in-school activities 4. Influence of formal status of individuals and groups on sorting.	3. Using a school setting with which you are familiar, identify possible bureaucratic and organic influences on in-school sorting patterns.	1, 3, 20, 21, 30, 37

UNIT I BUREAUCRATIC AND ORGANIC STRUCTURES: A COMPARATIVE ANALYSIS OF THREE HIGH SCHOOLS

TOPIC	CONTENT BREAKDOWN	OBJECTIVES	RELATED INCIDENTS
IV. Rules and the Manipulation of Rules	1. Selective rule enforcement as a method of studying the social organization of the school. 2. The effect of the standards of performance applied to teachers on rules and enforcements applied to students. 3. Variety of enforcers leads to variety in enforcement.	4. Given an incident, describe selective rule enforcement and speculate why this occurred.	1, 20, 25, 29, 31, 32, 33, 37, 43, 49, 50, 51
V. Bureaucracy and the Distancing of Responsibility	1. Bureaucracy shifts responsibility for enforcement from the enforcer to the system.	5. [Identify, describe, discuss] an instance in an incident in which the bureaucracy shifts responsibility for rule enforcement from the individual to the system.	3, 7, 31
VI. Formal and Informal Specialization	1. Discrepancy between formal job descriptions and actual jobs done. 2. Extent to which interpretations of jobs lead to de facto policy making. 3. The process by which informal roles and forms of organization become formally incorporated into the structure of the organization.	6. Given an incident, distinguish between formal job functions and actual job functions.	2, 10, 17, 27, 31, 33, 44
VII. Rules: On Paper and In Practice	1. Complete rule enforcement is impossible. 2. Patterns of differential rule enforcement can be related to the ways in which adults sort students into categories:	7. Given an incident, (1) identify three or more groups or categories; and (2) describe the patterns of differential rule enforcement which arise from relationships within the groups and individual characteristics.	1, 32, 35

UNIT I BUREAUCRATIC AND ORGANIC STRUCTURES: A COMPARATIVE ANALYSIS OF THREE HIGH SCHOOLS

TOPIC	CONTENT BREAKDOWN	OBJECTIVES	RELATED INCIDENTS
	a. influence of personal relationship of rule-enforcer to rule-breaker. b. influence of student status 3. Necessity for rules which are not enforced: a. contingency factors b. to symbolize formal hierarchy	8. Using a school setting with which you are familiar, identify one formal rule which is not enforced and [describe, discuss, analyze] the reasons for its non-enforcement.	25, 29, 48
VIII. Allocation of Space Within the School: Personal and Impersonal Dimensions	1. Scheduling as bureaucratic allocation of territory 2. Bureaucratic and organic influences on scheduling 3. Personal v. impersonal scheduling, as it relates to size and power struggles.	9. Given an incident, [identify, describe] the effects and possible effects of scheduling on the school's social organization.	3, 26, 31
IX. Performance Standards for Teachers: Evaluation Procedures	1. Formal and informal evaluations. 2. Relative importance of bureaucratic and organic influences upon control and assessment of teachers. 3. The response of the system to "problem" teachers. 4. Control and assessment of teachers dependent on opinion climate in school and community.	10. Noting both formal and informal procedures, and the relative importance of each, describe the nature of teacher evaluation procedures in a school setting with which you are familiar. 11. Differentiate between assessment procedures applied to "new" and tenured teachers.	16, 39, 40, 41, 48 39, 40, 41, 48
X. Formation of Organic Units Among Students	1. Bureaucratic influences upon sorting procedures. 2. Organic influences upon sorting procedures--structurally based sorting patterns v. ideologically based sorting patterns.	12. Given an incident, (1) identify student groups; and (2) describe the bureaucratic and/or organic influences on their formation and maintenance.	1, 12, 19, 30, 36, 38

UNIT I BUREAUCRATIC AND ORGANIC STRUCTURES: A COMPARATIVE ANALYSIS OF THREE HIGH SCHOOLS

TOPIC	CONTENT BREAKDOWN	OBJECTIVES	RELATED INCIDENTS
	3. Distinction between native and analytic categories. 4. Analysis of two student groups (Jocks and Freaks) showing characteristics of student sorting patterns.		
XI. Administrative Hierarchy and Specialization of Administrative Functions	1. Administrative strategies for maintaining control. 2. The effect of outside influences on the social and hierarchical organization of the school. 3. Functional autonomy of other administrative personnel. 4. Principal's intrusion into autonomous domains of his staff.	13. Given an incident, [identify, describe, discuss, evaluate] the strategies employed by school administrators for maintaining control of the school. 14. Given an incident, [identify, compare, contrast] those individuals' actual autonomy to their formal status in the organization.	4, 5, 8, 9, 18, 33, 35, 48 4, 5, 8, 10, 18, 33, 35
XII. Programming: The Master Bureaucrat's Task and its Effects on School Life	1. The purpose of the "tracking" system, and its effect on the social organization of the school. 2. The influence of programming upon sorting patterns of teachers and students. 3. The effect of size and complexity upon schedule efficiency. 4. Programming as it affects the bureaucratic/organic structure of the organization. 5. System wide mandates are ineffective unless alternative replacement mechanisms are provided.	15. Using a school setting with which you are familiar, [identify, discuss, speculate, evaluate, analyze] the effect of scheduling on student and teacher territory and the social organization of the school.	18, 21, 26, 43

UNIT I BUREAUCRATIC AND ORGANIC STRUCTURES: A COMPARATIVE ANALYSIS OF THREE HIGH SCHOOLS

TOPIC	CONTENT BREAKDOWN	OBJECTIVES	RELATED INCIDENTS
XIII. Influences on the School of External Rules	1. Dependence on outside funding makes institution subject to external controls and influences. 2. Implementation of new programs as a revenue source as opposed to modification of the organizational structure due to emergent needs. 3. Effect of new programs on school organization.	16. Using a school setting with which you are familiar, (1) identify an external rule; and (2) describe the positive and negative nature of its influence.	7, 8, 9
XIV. Policy Making and Problem Solving	1. Formal and informal policy-making bodies. 2. Roles of the formal policy-making bodies. 3. Control of principal augmented by insecure position of those beneath him in hierarchy. 4. Faculty meetings as policy-making bodies. 5. Administrative strategies for controlling faculty meetings. 6. Teachers may function as informal leaders in problem solving if results are fed through formal channels. 7. The Teacher's union as a device for controlling teachers' input into school policy. 8. Formal channels for student policy-making. 9. Administrative undermining of student channels of policy-making. 10. Student apathy toward student policy-making. 11. Parents as policy-makers.	17. Given an incident involving teachers, administrators, and/or students, [describe, discuss, contrast, analyze] the formal and informal roles of each as policy makers and problem solvers.	5, 12, 15, 18, 19, 27, 39, 40, 41, 42

TOPIC	CONTENT BREAKDOWN	OBJECTIVES	RELATED INCIDENTS
XV. Merit and Standards: Performance Measures and Their Relation to Social Control	1. Selective manipulation by principal of procedures and performance standards to maintain social control. 2. The Developmental Lesson Plan as the principal's strategy for social control. a. analysis of the principal's role as rule-enforcer b. bureaucratic influences on merit standards and teacher evaluation 3. Teacher strategies for dealing with the DLP and principal's evaluations. 4. Principal's use of classical bureaucratic model to control the school's social organization. 5. Teacher's responses to principal as a rule-enforcer. 6. Grades and reading scores as student performance standards. 7. Student performance standards as a means of social control.	18. Given an incident, discuss the pros and cons of several performance standards for social and quality control.	10, 11, 13, 14, 19, 25, 42, 46, 47
		19. Given an incident, [identify, discuss, analyze] either teacher or student strategies for dealing with performance standards.	10, 11, 13, 14, 16, 19, 25, 40, 41, 42, 45, 46, 47, 48
XVI. Other Rules and Enforcement Policies	1. Rules relating to the maintenance of order within the school building. a. the principal as rule-enforcer of student behavior b. principal control of mobility of teachers and students within the building c. principal's authority over teacher and student attendance	20. Using a school setting with which you are familiar, (1) identify rules and regulations; and (2) describe the way in which these rules influence the school setting.	7, 33, 38, 43
		21. Given an incident, [describe, compare, contrast] teacher and student strategies for dealing with school rules.	1, 7, 11, 12, 15, 18, 21, 43, 46, 47, 49, 50, 51

TOPIC	CONTENT BREAKDOWN	OBJECTIVES	RELATED INCIDENTS
	2. The effect of program cards upon: a. movement b. sorting c. clandestine territoriality 3. The influence of school size on rule-enforcement. 4. Student and teacher strategies to deal with rules.		
XVII. Bureaucratic and Organic Influences on Sorting	1. Multiple factors influencing sorting: a. residence b. ethnicity c. scheduling d. special programming 2. Size and impersonality of a school create a need for smaller, more manageable groups. 3. Influences on teacher sorting patterns.	**22.** Using a school group of your choice, [identify, discuss, compare, analyze] bureaucratic and/or organic influences on the group's sorting processes.	1, 6, 19, 30, 32, 36, 38

UNIT II FORMAL AND EMERGENT ROLES

TOPIC	CONTENT BREAKDOWN	OBJECTIVES	RELATED INCIDENTS
I. Introduction	1. Definition and comparative analysis of the terms "status" and "role". 2. Definition of the term "role set". 3. Roles as complementary sets of expectations. 4. Distinction between formal and emergent roles. 5. Introduction to event analysis.	23. The student will utilize concepts of status and role to make an analysis of incidents presented in this unit.	
II. Event Analysis	1. Effect of administrative policies on teacher roles. 2. Seating arrangement as an indicator of participant roles. 3. The nature and manifestation of various formal and emergent roles as observed in this example.	24. Given an incident, create an event analysis diagram which indicates [specified, selected] individuals' status, formal role, and emergent roles.	15, 18, 32, 39, 40, 41, 42
III. Role of the Principal	1. Credentials and qualifications of the principal. 2. Acceptance by the local power structure. 3. Duties of the principal; delegation of functions. 4. Emergent roles--variation in the performance of duties. 5. Role variation due to individual personalities contrasted to that due to differing bureaucratic and organic structures 6. General rights and duties of the role of principal	25. Given the six major tasks of a principal, cite an example from a school setting with which you are familiar of (1) how a principal delegates these tasks; and (2) how this delegated power affects the social organization of the school.	12, 16, 18

UNIT II FORMAL AND EMERGENT ROLES

TOPIC	CONTENT BREAKDOWN	OBJECTIVES	RELATED INCIDENTS
IV. Roles of Administrators	1. Assessment of credentials and local acceptance. 2. The role of "acting" administrator. 3. General rights and duties. 4. Scheduling and space allocation as the control of space and time. 5. Department chairmen as overseers of instruction. 6. The mediation function of administrators. 7. Discipline and order-keeping. 8. Emergent roles: a. gatekeeper b. institution maintainer c. expert bureaucrat d. institution expert e. ritual specialist	26. Given an incident, state the institutional effects which stem from an administrator's role as scheduler and space-allocator.	12, 16, 18
		27. Using a school setting with which you are familiar, [identify, describe, discuss, analyze] (1) administrators who perform one or more of the emergent roles listed; and (2) the effect of administrators' emergent roles on the functioning of the school.	33
V. Roles of Teachers	1. Teacher credentials. 2. Conflicting scales of merit. 3. Local acceptance--adapting to the system and amassing support. 4. General rights and duties of teachers. 5. Role of instructor determined by preferred method of instruction. 6. Social distance as it supports the bureaucratic structure of the school.	28. Given an incident, (1) identify teacher strategies in maintaining social distance from students; (2) describe behavior that is indicative of these strategies; and (3) explore the possible rationale underlying the behavior in terms of the bureaucratic structure of the school.	4, 13, 34
		29. Use an example to show how the school or district guidelines for planning/instruction determine the role of the teacher.	16, 17, 27, 45

UNIT II FORMAL AND EMERGENT ROLES

TOPIC	CONTENT BREAKDOWN	OBJECTIVES	RELATED INCIDENTS
VI. Political Alliances and Corresponding Roles Among Teachers	1. Sorting as a consequence of need to obtain autonomy. 2. Analysis of criteria for teacher sorting patterns. 3. Identification of main political groups in each school. 4. Analysis of specific political roles of teachers.		
VII. Teacher Roles Resulting From or In Response to Administrative Attitudes and Policies	1. General roles of resistance to the administration. 2. General roles of response to the administration: a. role of ritual specialist b. role of paranoid teacher c. role of teachers acting like students 3. Complementary role pairs.		
VIII. Additional Emergent Roles of Teachers	1. Cosmopolitans and locals. 2. Teachers by default. 3. Teachers as businessmen. 4. Hatchetmen and all-around policemen. 5. Community link.	30. Using a school setting with which you are familiar, (1) construct an event analysis chart of teacher roles; (2) use the completed chart as a starting point for your description of each role; and (3) speculate about the origins of each role.	34, 52, 53
IX. Roles of Support Staff	1. Analysis of the roles of the janitors in schools. 2. Role of the bus driver. 3. Gatekeepers: secretaries, clerks, security personnel, school aides. 4. Institution maintainers: Principal's secretaries.	31. Using a school setting with which you are familiar, (1) construct an event analysis chart of support staff roles; (2) use the completed chart as a starting point for your description of each role; and (3) speculate about the origins of each role.	20, 32

UNIT II FORMAL AND EMERGENT ROLES

TOPIC	CONTENT BREAKDOWN	OBJECTIVES	RELATED INCIDENTS
X. Roles of Students	1. Ambiguity of student's position. 2. Position of the student as an ascribed, not acquired, status. 3. Two types of student roles: a. roles necessary from standpoint of the institution b. roles developed in response to the institution	32. Using a school setting with which you are familiar, (1) construct an event analysis chart of student roles; (2) use the completed chart as a starting point for your description of each role; and (3) speculate about the origins of each role.	1, 34, 52, 53
XI. Roles of Specialized Personnel	1. Multifaceted role of the school nurse. 2. Dual roles of the guidance counselor.	33. Using a school setting with which you are familiar, (1) construct an event analysis chart of specialized personnel roles; (2) use the completed chart as a starting point for your description of each role; and (3) speculate about the origins of each role.	2, 36

Nature, Purpose, and Use of Instructional Objectives

An instructional objective is a statement of teaching intent. It is specific and precise, and serves to unambiguously define the learning task. Bloom has stated that instructional objectives provide teachers and students "some direction with regard to both the subject content and the mental processes which the student is expected to develop." Objectives are capable of being directly observable and are subject to measurement; therefore, the quality and effectiveness of the learning experience can be determined. In addition, a series of instructional objectives can be used to provide both instructor and student with a complete and precise summary of the course.

Instructional objectives may be placed along a continuum. On one end is found the precise and specific objective, which allows for easy transformation into assessable instructional strategies. On the other end of the continuum is found the more ambiguous objective, which attempts to measure feelings, attitudes, and understandings. The objectives for this material fall somewhere between the two extremes. They have been designed in this fashion to provide instructors with a variety of alternatives. Instructors have the option of reworking the objectives to make them more precise, or grouping them to arrive at larger instructional goals. Another option is to select among the objectives to define different teaching and learning strategies. This selection process can be determined in a variety of ways. Possible alternatives are:

1. The course instructor may select specific objectives from the alternatives provided.

2. The students may individually select specific objectives to meet their own needs.

3. The instructor and students may, as a group, select specific objectives on the basis of stated group needs.

4. The instructor may, using the course objectives as a guide, write his own set of objectives to meet the needs of a specific target population.

5. The student may be pretested on all of the course objectives, and tasks assigned on the basis of learner needs assessed by this pretest.

ACCESSING INDEX

UNIT III

INCIDENT	ANALYSIS?	RELATED INCIDENTS	SUGGESTED USES	RELATES TO OBJECTIVE #
1	X		As a model for future student analysis of incidents.	3, 4, 7, 12, 21, 32
2	X	20	Directed discussion - whole class.	6, 33
3	X	4, 5		3, 5, 9, 12, 17, 21
4	X	3, 5	Study assignment. (Incidents 3, 4, 5)	13, 14, 28
5	X	3, 4		13, 14, 17
6	X			22
7		8, 9		2, 5, 16, 20, 21
8		7, 9	Directed discussion - small groups. (Incidents 7, 8, 9)	13, 14, 16
9		7, 8		13, 16
10	X		Role-playing.	6, 14, 18, 19
11	X	13		18, 19, 21
12		16, 18		25, 26
13	X	11		18, 19, 28
14	X		Role-playing.	18, 19
15	X	1	Role-playing. Directed Discussion - small groups.	17, 21, 24
16		12, 18		10, 19, 25, 26, 29

INCIDENT	ANALYSIS?	RELATED INCIDENTS	SUGGESTED USES	RELATES TO OBJECTIVE #
17	X	16		6, 29
18		12, 16, 27	Study Assignment.	13, 14, 15, 17, 21, 24, 25, 26
19	X	43		12, 17, 18, 19
20		2, 23		3, 4, 31
21				3, 15, 21
22		20, 23, 24		11, 13, 19, 20, 21
23		22, 24	Directed discussion - small groups. (Incidents 22, 23, 24)	22, 28
24		22, 23		19, 20, 21, 28
25	X		Direction discussion - whole class.	4, 8, 18, 19
26	X			9, 15
27	X	18		6, 17, 29
28	X			
29	X		Directed discussion - whole class.	4, 8
30	X			3, 12, 22
31	X			2, 4, 5, 6, 9
32	X	37	Study assignment.	4, 7, 22, 24, 31
33		1	Role-playing.	4, 6, 13, 14, 27

INCIDENT	ANALYSIS?	RELATED INCIDENTS	SUGGESTED USES	RELATES TO OBJECTIVE #
34	X		Test.	28, 30, 32
35		36, 37, 38		7, 13, 14
36	X	35, 37, 38	Directed discussion - whole class. (Incidents 35, 36, 37, 38)	12, 22, 33
37		32, 35, 36, 38		3, 4
38		35, 36, 37		12, 22
39		40, 41, 42		10, 11, 17, 24
40		39, 41, 42	Study Assignment or test. (Incidents 39, 40, 41, 42)	10, 11, 17, 19, 24
41		39, 40, 42		10, 11, 17, 19, 24
42		40, 41, 42		17, 18, 19, 21, 24
43	X	19, 44		4, 15, 20, 21
44		43		2, 6
45	X			19, 29
46		47	Directed discussion - small groups. (Incidents 46, 47)	18, 19, 21
47	X	46		18, 19, 21
48	X			8, 10, 11, 13, 19
49	X	50, 51	Study assignment. (Incidents 49, 50, 51)	4, 21

INCIDENT	ANALYSIS?	RELATED INCIDENTS	SUGGESTED USES	RELATES TO OBJECTIVE #
50	X	49, 51		4, 21
51		49, 50		4, 21
52				30, 32
53				30, 32

SAMPLE CRITERION MEASURES AND RESPONSES

Exam for TA 3111

First Summer Session, 1975

For your final exercise, we are asking you to prepare an analysis of two incidents taken from the field notes on Sheridan High School, the urban school in our study. You may follow any model you choose in preparing your analysis. If you wish, you may follow the outline of the sample analysis presented in class. A summary of that presentation is provided here for your use. You may also modify, add to, or discard any part of this method of analysis, as you so choose.

Whatever model you choose upon which to base your analysis, however, you should keep one general goal in mind. Throughout this course, our overall aim has been to provide you with a way of looking at the behavior of people in schools in such a way as to understand how the actions of individual people in real situations are constrained or influenced by the social facts of their environment. Therefore, with regard to the two incidents we are asking you to analyze, the general question we wish you to answer is, "What are the social facts constraining the actions of the people in these incidents, and how do they react to those social facts?"

The Ring Ding Caper (As reported by a student informant)

C: This is Laurie Horgan and me talking. Do you want to tell the story you told about your brother?

L: Well, my brother bought some Ring Dings in the cafeteria and since he knew that he couldn't get them out, he had Bob Winston take them out to him. He said that he was going to go to the boys room, Bob did.

C: Why could Bob Winston get them out if he couldn't?

L: Well, Bob Winston is in the cafeteria. He's on unstructured time which is like a privilege for the student who keeps his marks up and doesn't fail more than two subjects.

C: Oh, and your brother is off unstructured time.

L: Yeah. The only reason he's off unstructured time is because he failed one, I think it's English 11 and he's failing gym and automatically an F keeps you off unstructured time. So Bob finally couldn't get out with the Ring Dings and Mr. Dendy goes well, you can go to the boys room and that's it, but my brother met Bob out in the hall and Bob goes well, I can't get them out, Joe. So Bob came back in and Joe came in with a pass from study hall. Joe goes can I talk to Bob Winston? So he goes over and Bob puts the Ring Dings in my brother's pockets. Meanwhile Mr. Dendy goes well, I don't trust that guy.

C: You heard him say that?

L: Yeah. So my brother looks up and then my brother just jots out the other door to the study hall and meanwhile Mr. Dendy takes off running and everybody's yelling you should be a track star, Mr. Dendy. First my brother ran into the boys room and tells the boys well, you better put out

your cigarettes, guys, because there may be a teacher in here. Mr. Dendy was looking out in the hall for him and couldn't find him so he started back in. But then he started back out of the hall and my brother came out and went into study hall. Mr. Dendy ran after him yelling Scott, Scott, Scott. My brother meanwhile throws his jacket to Ronald King and goes Scott who? I'm not Scott. And he goes well, whatever your name is. He goes in and he goes well, what are you doing with those food outside the cafeteria? You know you're not supposed to eat outside. My brother goes well, I'm going to eat it for lunch and besides, it's not all mine. It's Jim Turndale's and Curt Beckmann's. Ronald King goes yeah, and do you have a search warrant. I don't know if Mr. Dendy told him to shut up or what but then he goes do you want to go to the office. My brother said well, it doesn't matter to me. So Mrs. Gowdy comes in and she goes well, what's the problem?

C: Why did she just come in?

L: Well, see like when everything is going wrong and Mr. Wyatt [the principal] is out, then Mrs. Gowdy is like in charge and she handles his job if he has like interviews or something. She tells them where he can be reached and she tried to like settle it quietly.

C: Well, how did she get into the study hall in the first place? This took place in the study hall, right?

L: Right, she was outside, well, in between the door of the office looking in and she saw Mr. Dendy come in here and wonder what's going on and why my brother came running in. Then she asked my brother what was he doing with those outside? He said I wanted it for lunch. She takes the

food back into the cafeteria. Meanwhile, my brother goes well, I paid for it and I'm going to keep the food, and all this. Ronald King is still yacking away about you need a search warrant and all that. My brother later on told me that if Ronald had either hid my jacket instead of keeping it there then they wouldn't even knew I had the jacket on or anything. Finally, Mr. Dendy said well, I don't want to catch you in there with food being taken out of the cafeteria. Otherwise you're going to go to the office and I'm going to turn you in for good. When Mr. Dendy came back, Gary Cox came over and said well, why did you have to turn Horgan in. Mr. Dendy goes well, he knows he's not supposed to have food outside the cafeteria and Gary goes well, if I had bought a box of Ring Dings then I would have surely wanted to keep them. Then Hal Selman got into it and said yeah, and I agree with him. Why do you have to take the food away from a kid when it's his food and if he says he's going to eat it later, that doesn't mean he's going to eat it in study hall or something. Then Mr. Dendy looked up and he said who's that girl in the blue dungaree jacket? So he just motions....

C: Who was that?

L: Nancy Wright. He motions with his finger and he said well, who is she and then Mary came and said Nancy Wright and Nancy comes over with her books and he goes well, where did you come from? She said I went to see Mrs. Ferguson because I needed to see her immediately. He goes well, why didn't you get a pass? She says, I looked and you weren't here. He goes well, I was out in the hall. She goes no, you weren't, Mr. Dendy. He goes yes I was. She goes no you weren't. I looked and I did not see

((She was in the cafeteria.))

you out there so I went and I came back. He goes well, ok, but don't let it happen again.

C: He wasn't in the hall. He was in the study hall.

L: Yeah. He was in the study hall. He wasn't in the hall. Like Nancy was really going to get after him because she knew what the Ring Ding business was all about because she's like in a clique with my brother and Jim Turndale and Curt and Carrie Tinsman and Bob Winston and all the other guys that are around him.

C: Who, Carrie Tinsman?

L: Yeah. Carrie Tinsman. Like it's like a certain clique. Even though Gary Cox really isn't in the clique because he just recently moved into Green Valley, he is like starting to get more into the clique now. That's why I think he really started getting in on my brother's defense. It's really amazing how just a thing over Ring Dings could happen. Then my brother was saying that no sooner had second period ended then everybody started running out and said hey, Horgan, hear you got caught taking food out.

Analysis

We are now going to analyze this discrete episode of behavior at three separate levels of analysis, in order to see how this apparently unique series of events can be tied into the larger patterns of behavior in Green Valley High School. These three levels of analysis correspond to the three units of instruction which will eventually comprise this course. You have read and responded to parts of the first two of these units. The three levels of analysis are:

1. The structural level, in which the whole school organization is taken as the unit of analysis. In Unit I, we discussed two major forms of organization at the structural level. These are (a) bureaucratic forms of organization and (b) organic forms of organization.

2. The role level, in which generalized patterns of behavior of individuals are taken as the units of analysis.

3. The level of individual strategy, in which the living, unique individual involved in actual, unique situations is taken as the level of analysis.

In the following analysis of the Ring Ding Caper, the procedure will be to move through these three levels of analysis in order, starting at the more abstract level of structures and ending at the concrete level of individual strategies. We will first extract from the incident all of the bureaucratic and organic influences which we see to be operant in this situation. Next we will extract all of the roles (both formal and emergent) which we see people playing in this incident. Finally, we will examine the

strategy of a single actor, Joe Horgan, to see how his actions are constrained by the various social facts we have extracted in the first two steps. (Note: for those of you following this example in writing your exam, you may also choose one actor in each incident from whose standpoint you may analyze an individual strategy. It is not necessary to analyze all the strategies of all the actors in these incidents.)

Analysis at the Structural Level

Bureaucratic Influences

Several school rules are involved in these proceedings. The most important ones which we run across are:

1. No taking food out of the cafeteria or eating in school elsewhere than in the cafeteria.

2. Unstructured time. This rule gives certain mobility privileges to students with acceptable grades.

3. A pass is required to leave the study hall.

4. A pass is required to leave the cafeteria.

5. No smoking in the school (for students. So far all these rules are for students.)

6. The right of a teacher to enforce rules and supervise the conduct of students.

7. Various scheduling regulations specify where botb the teacher and the students in this incident are supposed to be during this period.

In addition to these school rules, one external bureaucratic influence, an underlying principle of many county, state, and Federal laws,

is involved:

8. The right of an individual to hold private property.

Organic Influences

1. The students involved in this incident are all members of a clique which derives from common residence in the town of Green Valley.

2. The principal's secretary, Mrs. Gowdy, has an informal specialization in the school as a mediator.

3. The students have a clandestine territory, the bathroom.

4. The teacher supervisor in the cafeteria, besides being formally assigned to that duty, has taken on the job so enthusiastically that he has created an informal specialization as a disciplinarian for himself.

Analysis of Roles

Let us now go through the incident and point out some of the most important roles that the actors play toward each other. The list will not be exhaustive, but the roles most crucial to the action will be picked out. First we will list the individual actors and the various roles they play in this scene. Then we will arrange the roles themselves in complementary pairs.

Mr. Dendy enacts the formal roles of rule-enforcer, cafeteria supervisor. He also has created for himself an emergent role as a strong, not merely a lip-service, disciplinarian. With their accusations about search warrants, the students try unsuccessfully to get him to play the role of "citizen who respects property rights." He plays the role of disputant in response to Mrs. Gowdy's role as mediator.

Joe Horgan plays the roles of rule-breaker and citizen-with-property-rights towards Mr. Dendy. He plays the roles of clique member, rules-breaker, and fellow student towards his friends. He plays the role of disputant toward Mrs. Gowdy.

Ronald King and the other clique members to varying extents play the roles of accomplices as well as those of clique-members towards Joe in his role as rule-breaker. The boys in the bathroom, all of whom are not Joe's fellow clique-members, also play the roles of fellow-students and accomplices towards Joe. They play the role of citizens-upholding-property-rights toward Mr. Dendy.

Nancy Wright does not abet Joe directly and thus she is not strictly speaking his accomplice. She does try to embarrass his enemy, however, and she can be said to play the role of ally toward Joe. Towards Mr. Dendy she plays the roles of rule-follower and student-with-rights-and-needs-to-see-Mrs. Ferguson.

Mrs. Gowdy's formal roles are as assistant to the principal and clerical worker for the school. Here she plays an emergent role as mediator between the disputing teacher and student, Mr. Dendy and Joe.

The role pairings look as follows:

1.	Mr. Dendy cafeteria supervisor rule-enforcer disciplinarian	Joe Horgan student assigned to study hall rule-breaker citizen with property rights
2.	Mr. Dendy rule enforcer in loco parentis super-visor of adolescents	Gary Cox and friends citizens upholding property rights

3. Joe Horgan fellow student clique member rule-breaker	Ronald King and others fellow student clique member accomplice
4. Joe Horgan clique member fellow student rule-breaker	Nancy Wright fellow student clique member ally
5. Mrs. Gowdy Mediator	Joe Horgan and Mr. Dendy disputants
6. Joe Horgan fellow student rule-breaker	the mokers in the bathroom fellow student fellow rule-breakers and potential accomplices
6. Joe Horgan (when he goes back to his assigned study hall) rule-follower	Mr. Dendy rule-enforcer

Analysis of Individual Strategy

Since we have defined individual strategies as the unique reactions of real people to unique situations, obviously each actor in this incident can be said to have a strategy. Here we will trace the strategy of Joe Horgan to see how he manipulates and reacts to the various social facts we have extracted in the first two steps. Some of his actions are pre-planned.

Others are improvised reactions to the contingencies of the immediate situation.

Strategies can only be described with respect to the goals that the individual actor is trying to accomplish. In this case, Joe's overt goals are easy to name. They are, at first, to get Ring Dings out of the cafeteria, and, next, to escape being punished for breaking rules.

1. Joe tries to get his friend Bob Winston to sneak the Ring Dings out of the cafeteria. He is trying to manipulate (a) the unstructured time rule giving his friend special privileges and (b) his relationship with his friend. Notice that the social fact of his relationship with his friend can be described at either the structural or the role level of analysis. At the structural level, we might say that the friendship is part of an organic pattern, since they are friends outside of school. We might also note a bureaucratic influence on their relationship since they are both formally classified as student, and this formal classification also throws them together inside the school. The corresponding roles are clique member to clique member, and fellow student to fellow student. We will not spell out the analysis from both levels in the following steps, but it can be done in many of the steps.

2. Failing in his first attempt, due to the vigilance of the rule-enforcer and disciplinarian, Mr. Dendy, Joe next manipulates another set of rules, those allowing students to leave assigned areas with special passes.

3. Upon being chased, Joe next tries to escape to the informal student territory, the bathroom. In the process, he nearly gets a number of fellow students and rule-breakers in trouble.

4. Fleeing the bathroom, Joe's next move is to act like a rule-follower by going back to his assigned place in study hall.

5. Being apprehended anyway by Mr. Dendy, Joe next has the good fortune of having the principal's secretary, Mrs. Gowdy, activate her informal role as mediator.

6. Finally, Joe has attention turned away from him by his ally, Nancy Wright, who engages Mr. Dendy in another quibble about rules, in which quibble she manages to gain the upper hand by demonstrating that she has been following the rules.

Incidents for your analysis

Here are two incidents from Sheridan High School. Both occur in meetings of the teachers' union. One involves the teachers and the principal, the other the teachers and two students. Analyze each incident separately at first. Then, if you wish, you may make generalizations based on the comparison of the two incidents. You may use part or all of the method used in the sample analysis, or you may use whatever method or model you choose. You can refer to previous materials on Sheridan you have received for background. Remember, there may be several places in your analysis where you may not think that you have enough information. In those situations, state the inference that the material suggests to you and then specify as exactly as possible the nature of the information that you would need to validate or disprove your tentative hypothesis.

Incident #1. This is a meeting of the Sheridan chapter of the teacher's union, the UFT. At a previous meeting, which our same observer had attended, it had been decided to ask the principal to this meeting to discuss certain aspects of his methods of observing teachers. We have already mentioned the high level of tension in the school over the principal's unprecedented number of "Unsatisfactory" ratings during his first year in the school. The people who speak in this meeting should be described briefly, as we will see them again later. Bill Lowry is the UFT chapter chairman in Sheridan. We interviewed him several times during which interviews he described to us his policy of trying to work with the principal on a cooperative basis rather than establishing an adversary relationship. Both Bill and the previous UFT chapter co-chairman whom he replaced attributed Bill's election to the chairmanship to his advocacy of this type of policy. Eileen Shea was one of the principal's most outspoken opponents during our fieldwork. In the excerpts from the meeting presented here, we see Eileen agreeing with the principal, but at another point, she rose to berate him on another issue.

The next topic to be brought up was the topic of classroom observations. I forget exactly how Bill Lowry initiated the discussion on observations, but I remember at one point the question was put to the principal will you stop making observations of people out of license? Mr. Sontag made a flat refusal, "No, I won't." It was at this point that Sontag made a definite statement saying, no I will not do this, or I will continue to do such and such, indicating that this was not an area of debate. This is

my prerogative as principal and this I will do. The issue of observations, as was discussed in the earlier UFT council meeting that I attended was that Mr. Sontag should make attempts to observe people only when they are teaching classes within their license, that he should not if at all possible observe people who are teaching out of license. Mr. Sontag said he would not do this. His job is to monitor instruction. He said that he cannot monitor instruction unless he sees what a teacher is teaching. A couple of times Mr. Sontag asked Bill Lowry, "Bill, what do you expect me to do? If a teacher is teaching all classes out of license, am I not supposed to go in and see what that teacher is doing?" The teachers said, "In that case you would have to make those observations." Then Bill said, "We would like you to at least not write up formal observations of people who are teaching out of license." Mr. Sontag said, "I can't do that. If somebody's incompetent or not doing their job, what do you expect me to do, not say anything about it or not do anything about it? I have to make those observations and I'll continue to do that." A couple of times I heard Eileen Shea agreeing with Mr. Sontag that he has to make observations of people whether it's within their license or out of their license.

Then there was a whole discussion as to the role of the department chairmen. Bill was saying, "Well, some assistance should be given to people who are teaching out of license. After all, a lot of people feel weak in this area." Sontag said, "This is the role of the chairman I have instructed the chairmen to give every possible support to teachers." He said, "This includes giving them lesson plans, giving them materials, giving them curriculum guides, giving them demonstrations."

Bill was saying that in effect this does not happen, but Mr. Sontag said, "Well, I have directed the chairmen to do this." A couple of times Mr. Sontag made the point that for example in reference to the chairmen being instructed to aid the teachers, that a lot of this had taken place before he was principal. He said, "Three years ago there was much less instruction going on in this place. Three years ago the school was in a lot worse condition than it is now. Since the beginning of this year, I have made 50 observations. I like to know what's going on in this school. I like to have an idea of what instruction is taking place in this school." . . . . . Now, just as aside because I'm not sure at all where this fits into the conversation, but Sontag was talking about doing the things that one can do best. He said the thing that he felt that he could do best was to be a classroom teacher. He thought he was a good classroom teacher and he is going to return to the classroom and he is going to teach again. Because that is what he feels he is most qualified to do and does the best.

Then in the same context of this discussion, that had to do both with people starting their classes late and also with Sontag dropping in unannounced on classes, somebody said that because of all of these tactics, there is a morale problem in the school. One of the teachers mentioned that. He said, "There's a problem of morale. Teachers worry about when you're going to drop in and see them." Mr. Sontag said, "I don't think there's anything wrong with a little bit of tension. I think people are much more creative under tension and I don't mind having a little bit of tension in the school."

Incident #2. Another UFT meeting. This time the visitors are not the principal but two students who are members of another school committee. They have come to talk about "student-teacher communication," as they phrase it in the jargon of their leadership class. The UFT members quickly re-interpret their topic, however, as student evaluation of teachers. The two students, by the way, Barney and Sheila, are part of a relatively small group of Sheridan students who are very involved in student government. In general, the same students are often members of the different student and school committees. This group is drawn from all the ethnic groups in the school, but they all share the role of "good student," that is, they all have good grades. These students obtain certain privileges but this is a good example of what happens when they try to actually influence school policy.

I went upstairs to sit in the teachers lounge and wait for the meeting to begin. When I went into the faculty room, there weren't any teachers there. There were just two students. One was Barney from the leadership class and the other was a girl named Sheila McMann. I had never seen her before. She has a fair complexion and long blond hair. I sat down. Barney said hello. I said hello to them and I asked Sheila if she were from the leadership class also. She said no, she was on the curriculum committee with Barney. They said they were going to sit in on the UFT executive council meeting, that they were invited up here. I asked them what they had come about. They said that it was about some things that they had been discussing in the curriculum committee. I asked them a few questions about the

committee. They told me that it's made up of students, teachers, parents and administrators; and that all curriculum changes go through this committee. I asked, "What actual powers does the committee have?" "It just has advisory powers. It can recommend things to the principal and all the important changes in curriculum that have come about in the school in the past year have come through the council. For example, we set up this high school equivalency program last year." Then Sheila said something to Barney like, "I'm really nervous. I'm not ready for this today." Barney said, "Don't worry." By now a few teachers were coming in. A few of them seemed to know Sheila and Barney and said hello. Bill Lowry came in and called the meeting to order. First they went over the minutes from the last meeting.

After the minutes had been read and discussed, Bill said, "If you don't mind, I'd like to bring as the first thing on the agenda the student discussion so that they don't have to stay here for the whole meeting." Then Bill presented Barney and Sheila and said that he had invited them up to explain something that had been discussed in the curriculum committee. Sheila started and presented the discussion that had come up in the curriculum committee. There was some feeling on that committee that there is a lack of communication between some teachers and some students. Some students have problems with a particular teacher. Some felt that there is a failure to communicate and that the curriculum committee would like to set up some structure by which these problems can be discussed. She and Barney had come from the curriculum committee to ask for the advice and the assistance of the UFT in setting up this kind of structure. The way that Sheila actually phrased this whole thing was that they had come to the UFT to help establish a structure for teacher-student communications.

Then there were a lot of hands being waved and Bill Lowry said, "We'll just go around the room and each person will have a chance to ask the students questions." They started with Arthur Hoffman. Arthur started saying that the problem has to do with quality. Then he said, "You have to be sure exactly what the nature of your problem is." Then he said, "Aren't you in effect trying to review the quality of teaching?" Sheila said, "No, we're not reviewing teachers at all. For example, if one kid comes up and says 'I'm having trouble with a teacher,' the committee would look into that. They might figure, 'that's one kid.' But if one kid comes constantly or if a whole class comes and says they're having a problem with a teacher, that's something that the committee would look into." Then Arthur was saying, "You haven't really decided what constitutes a problem." At this point, Barney got up and said, "No, no, no. Here's an example of a problem." He talked about a student transferring out of a math class because he couldn't work in it.

Then the floor shifted to Dr. Cracaw who raised his hand and said, "I've been making some notes while you were talking. You may have noticed me making these notes. I've jotted down some words that I would like some definitions of." Then he talked about communication, he talked about relevancy, and he listed four or five words. I don't remember what other words he put down. He said I'd like you to define them. What do you mean by communication? Then Sheila tried to explain it again. Cracow said, "Aren't you really talking about whether or not you like a teacher?" Sheila said, "No, it has nothing to do with whether or not we like a teacher." Then Barney mentioned as one of the examples that students have in communicating with teachers a particular petition that had been gotten up by one

class. I don't know what the petition was about, but it had something to do with a conflict between a class and a teacher. The petition was drawn up by some of the students in the class and signed by everybody in the class and then given to the teacher. This petition was thrown in the garbage by the teacher in front of the class. Both Barney and Sheila referred to this example a couple of times when they were talking about the problems that students have in communicating with teachers. Then there was some discussion on how students can know whether or not they are learning. Sheila said it has to do with whether or not a student feels like he or she is learning in a class. Cracow said, "Half the time a student doesn't know if he's learned anything until after he's gotten out of that class and gone to college. I've got students who come back to me now from college saying how much they learned in my class, but they didn't understand it at the time." Then he asked Sheila, "Why did you drop out of my physics class?" Sheila just sort of looked at him. Then a couple of people said, "Oh look, you're putting her on the spot. Don't put her on the spot. Don't ask her about that." But it turns out that Sheila had dropped out of Cracow's class in physics.

The next person to get the floor was Barbara Mandel. She said, "I've got a few questions that I would like to ask and have clarified. First of all, what is this curriculum committee, who is it, how is it selected?" It sounded like she was confusing curriculum committee with consultative council. So Sheila said well, this isn't the consultative council. This is the curriculum committee and Mrs. Weissman (an assistant principal) is the head of it. It's made up of students, teachers and parents. Then

Barbara said, "How is it selected?" The two students didn't seem to know. They said that they had just been picked for the committee. Barbara said, "You weren't elected or chosen or anything like that?" They said, "We were just picked for the committee."

After Linda finished talking, Eileen Shea took the floor. She made the point that what the committee was asking the UFT to do in effect was to assist in setting up a mechanism that would censor teachers. Eileen said that the UFT can't censor one of its own. That would be unprofessional. Eileen said that this was the job of the chairman. It's the chairman's responsibility to help a teacher. If the teacher is having a problem, it's up to the chairman to help the teacher with that specific problem.

Then Valerie took the floor and agreed with Eileen in a sense and said that there should be one person appointed by the school as a mediator between students and teachers when disputes come up. Valerie said that there are some schools that have a person serving in this position. This person is on staff. It's somebody who's trusted by both the students and the teachers. This person helps to settle any kind of dispute that arises. Then three different people in the room said that's the role of the chairman. It's the chairman's job to see to it that any kind of conflict like this is resolved.

Then some of the people at the meeting started to press Barney and Sheila as to exactly what they were talking about, how many teachers, what kinds of things would be brought up before this council. When asked specifically how many teachers were they talking about, they said well, maybe two or three. Then one of the teachers (I didn't know his name) said

to Sheila, "You know, sometimes, ... and he was saying what Cracow had said before. He said that sometimes students don't realize that they're learning something because it has to do with whether or not a student likes or doesn't like a particular class, that sometimes it's very difficult for a student to tell whether or not he is learning. Sheila said, "We're not looking at problems of one particular student. It's when an entire class says that they're having a problem with the teacher that the council would look into it.

Now, after everybody had gone around once in the room and made some comments, there were still a lot of people that looked like they wanted to say things, but Bill said he thanked Barney and Sheila for coming to the meeting and said that the executive committee would discuss this further and that he, Bill, would get back to them in a week or two and let them know what the decision was. Then Barney and Sheila got up and walked out. As they were going out, people started talking to each other. I couldn't hear exactly what was said, but, later on after the meeting was adjourned, I heard people talking about the proposal of the curriculum committee. There were comments such as "I don't like it," "It's teacher rating," and "One thing will lead to another." Bill Lowry in particular said, "I don't like this whole idea. Its gets into rating teachers. I don't go for this." I sensed a pretty general opposition among the people to the proposals of the curriculum committee. It will be interesting to see when and if Bill does get back to those students and what is going to come from this. (Editor's note: nothing ever did).

Sample Response

Incident #1

Analysis at the Strctural Level

Bureaucratic Influences

1. UFT meeting held and principal requested to attend.
2. The right of the principal to observe teachers.
3. The right of the principal to submit formal evaluations.
4. The duty of department chairmen to provide proper aid and instruction to teachers teaching out of license.
5. Teachers' duty to start classes on time.
6. The privilege of the principal to reject teacher demands and requests as long as he remains within the bounds of his formal authority.

Organic Influences

1. Teacher - principal dichotomy.
2. The need for the principal to justify his refusals and to justify his position.
3. Bill Lowry, although formally the teachers' representative, is informally a mediator between teachers and administration.
4. Teachers begin classes late.
5. Principal creates tension by intensely pursuing role of supervisor and order- keeper.

Roles

1. Mr. Sontag - evaluator of teachers; "teachers' disciplinarian"; order keeper (teachers must begin classes on time); refuses to assume

responsibility of the chairmen (to give assistance to teachers teaching out of license); needs to justify his actions to the faculty.

2. Bill Lowry - formal role of teachers' representative; informal role as mediator.
3. Teachers - intimidated opponents of administrative policy ("In that case you would have to make observations.")

Strategies

Mr. Sontag - Mr. Sontag must attend the teachers' meeting upon having been requested to do so. He must give a response to the teachers' demands. The informal need for some degree of cordiality and civility between principal and teachers necessitates that the principal must not simply use his bureaucratic powers to refuse teacher demands, but must rather make some defense of his position. Mr. Sontag asks the teachers what is he to do? Certainly he must make evaluations. Also, Mr. Sontag strengthens his positions with two other strategies. First, he tells the teachers that before he took over as principal there was "much less instruction" going on in the school. Thus he justifies his methods by implying that the faculty without his proper management was not successful. (It is interesting to note that in the interview with the field-worker, Mr. Sontag said that there had been "no" instruction prior to his principalship.) Second, Mr. Sontag makes mention of the fact that he was an excellent and successful classroom teacher. He seems to imply that he understands teaching and that those who don't have no right to question his evaluation policies.

Incident #2

Analysis at the Structural Level

Bureaucratic Influences

1. UFT meeting held and students invited to attend.
2. Curriculum committee composed of students, teachers, parents, and administrators. Committee has only advisory powers.
3. UFT will not censor a member.

Organic Influences

1. "Good students" obtain special privileges.
2. Apparent success of curriculum committee to introduce innovations.
3. Teacher animosity toward evaluation of teachers.

Roles

Students - representatives of committee, seeking to gain "a control" over teachers.

Teachers (2 groups)

a. provide "delay" tactics, ask irrelevant questions

b. reject the students' request

Bill Lowry - teachers' chief spokesman (here he does not play the role of mediator.)

Strategies - Bill Lowry

He keeps student presence at the meeting short. He uses delay tactics and makes an empty promise. Human relations approach is applied.

Conclusion

In both incidents - ritual events, Those in power do not relinquish their powers. Bureaucratic structure and organic supports are used to suppress those seeking to assert controls over power-incumbents.

Sample Response

Incident 2

It is unclear exactly who initiated the students' attendance at the UFT meeting; presumably it was the Student Committee. Ambiguity also seems evident. The material states that "all important changes" have come about through this particular committee yet the ineffectiveness in this instance would seem to contradict the previous record. If this is a committee composed of teachers, parents, administrators as well as students, why were only the students forced to face the faculty specifically the UFT chapter. It would seem that opposition from this particular faction could easily have been predicted.

The choice of Sheila as a good student of fair complexion, long blond hair presented the image of a non-minority, hardly a trouble-maker type. Both students tried to keep the topic on general terms, avoiding specifics, simply asking for some mechanism to arbitrate student/teacher problems.

The continual efforts of the faculty members to bring it down to specific points indicates the degree of fear they experienced that this could very easily become an unpleasant experience for them. The constant reference to their superior positions as teachers, trying to intimidate the students by asking irrelevant questions. Mr. Cracow's mention of the fact that he was taking notes, requiring a set of definitions of terms used, could probably be an effort on his part to obscure the issue, ending up by totally "destroying" Sheila by his reference to her transfer from

his class. He as well as other teachers justify present performance by reference to former students' gratitude, a point that cannot be checked, and therefore safe.

The students are in one sense forced to use the same ploy by reminding the teachers that Mrs. Weissman is the head of the Committee they represent. The teachers' constant effort to establish and maintain control of the discussion was somewhat thrown off balance by Eileen and Valerie by saying it was the Department Chairmen who were responsible and if the existing system wasn't adequate another person should be appointed to handle this problem - the bureaucratic system becoming self-propagating. Both Valerie and Eileen did bring the actual problem back into better focus after Cracow and Mandel had succeeded in totally obscuring it.

The faculty's desire to know exactly how many teachers were involved in the student discontent displayed a large element of self interest and no one seemed willing to commit himself to such a suggestion despite the fact that only 2 or 3 people were concerned. It was obviously a disturbing idea and even Bill departed from his middle of the line approach and committed his opinion (informally).

The students were formally placated and told that they would be informed of further action ... and they all lived happily ever after.

OBSERVED BEHAVIOR	THEORETICAL INFERENCES	INDIVIDUAL AGENDAS	SOCIAL VARIABLES
- both members of student committee; drawn from all ethnic groups. - academic requirements for admission - Sheila, nervous; Barney, apparently less nervous. - several references made to teacher destroying class petition - deliberate effort to keep discussion on generalized topic; avoidance of specifics - change of physics class for Sheila	- despite academic requirements for membership, this committee has very little apparent effect on policy - "fair complexion....long blond hair" i.e. not a member of a minority group. Is that why she might have been chosen for this task? - anticipation of success because all "important changes in curriculum have come through committee." - resort to authority by reminding Mandel that Mrs. Weissman is head of committee they are representing.	- to represent the legitimate request of the committee for greater teacher/student communication. - set up some structure whereby this could be accomplished. - utilize services of the UFT to achieve this. - purpose had to be redefined: "NOT to review teachers" - forced to use specific instances to illustrate need. - definition: ENTIRE class complains about ONE teacher.	- intelligent students possibly seen as a threat to faculty. - expect opposition despite former "success" of changes in past year. - apparently requested to attend themselves in order to present suggestion. - representing students' point of view to "hostile" audience; constantly being verbally thrown off balance. - Sheila is used as an example of teacher/student conflic and unable to reply.
Bill Lowry - chair meeting at which the students will be present - dual role of impartial mediator - student/teacher problem to be handled first so students can leave and meeting continue - sensed general opposition to students' suggestion	- efforts at impartiality not too effective. - voices personal displeasure in terms of "pretty general opposition"; possible effort to play both sides in order to maintain favor of both - delayed action on request as stalling tactic; personal fear of such action	- to maintain image of "good guy" by chairing the meeting in an orderly fashion. - formal expression of gratitude and promise to act on suggestion.	- obvious sympathy with faculty but joining into discussion only insofar as his chairmanship of committee demanded. - very ittle to say except inform ly after students depart. - image mai ined and position used to avoid immediate action; postponement equated with NO ACTION, but not verbalized as such.

Incident I

More information would seem to be needed as far as the number of teachers working out of license is concerned. The materials state: "If a teacher is teaching all classes out of license..." Such a situation would assume that the person is working in several departments otherwise a subject-qualified teacher would have been hired. Insofar as that is correct i.e. "all classes out of license" Mr. Sontag made a good point. However his reason for so doing was more authoritative than educational. If the situation was very prevalent and presumed to be a permanent one, Eileen Shea's acceptance of it was quite correct, but the question here is to what extent would she herself have been involved in the subsequent evaluations.

Bill Lowry's position was an awkward one, given his tendency to maintain maximum good will. He took the hardest line possible in the beginning and gradually backed off by requesting that such evaluations not be written up and suggesting that the Department Chairmen were not taking the responsibility for helping such people. This could easily get him off the hook.

Sontag displayed a gradual departure from his manner although not from his refusal by introducing a lot of distracting small talk about how good he was as a teacher, a point that cannot be debated in his present position. Aside from his formal role of principal, Sontag constantly gets and keeps the upper hand and forces the discussion to go his way. Eileen Shea's possibly out of character agreement with Sontag might have totally disarmed Lowry and given Sontag added assurance which he might

not have used had she not spoken. More information might be useful on Shea in this regard.

Did Shea enjoy her reputation as a fire-brand, the one who is determined to keep all organizations honest? Was she trying to minimize her reputation by agreeing whenever possible or did she really believe that Sontag had the right to evaluate in writing the performance of teachers working out of license.

Both sides shifted the ultimate responsibility on to the chairmen, who were slightly above teachers but definitely below administration. Sontag's reference to the great improvement in the school since his arrival seemed to be an effort to justify an unpleasant reality which he had absolutely no intention of changing, further stating that tension was good and he intended to maintain it. He apparently tried to minimize the force of his decision by such small talk about his own enjoyment (translated as "success") as a classroom teacher.

Everybody's dignity remained intact although the faculty did not get what it set out to get but succeeded in making Sontag aware of their displeasure.

OBSERVED BEHAVIOR	THEORETICAL INFERENCES	INDIVIDUAL AGENDAS	SOCIAL VARIABLES
- unsatisfactory ratings - definite negative statement concerning his refusal to stop observations out of license. - unannounced visits to classrooms.	- refusal to be pushed into a corner by Lowry - shift the responsibility to department chairmen. - effort to justify the present situation by reference to how bad it was before. - force his questioner to give the answer by asking; "What do you expect me to do?" - constant reference to role as a justification of actions and judgments. - possibly enjoy the degree of tension that he creates; justifying it as good for the school.	- monitor level of instruction - observations in writing - detect and eliminate incompetence. "Need to know" - instruct the department chairmen to assist teachers in need. - justify actions by reference to rules and regulations; present himself as a man of high standards willing to pay any price to maintain those standards.	- return to teaching so that he can't be presently judged by his peers - they have only his word for the fact that he was good at it - refusal to stop based on fact that he is the principal and all decisions will come from him by the authority of his office.
Bill Lowry - work on cooperative basis - initiates discussion on observations - gradual retreat from initial position when confronted with principal's refusal.	- moderates his viewpoint in order to get and stay elected; possible line of action characteristic of man. - use prior discussion on observations in absence of principal to force a decision in his favor to maintain popularity with staff as well as administration. - anxiety of teachers concerning unannounced visits partially his problem as solution to it largely rests with his ability to handle principal.	- to call the meeting in as least a threatening manner as possible to retain favor of all parties. - to initiate the discussion on observations subtly, yet get them stopped. - maintain supportive role at all costs.	- back-track to his predecessor to justify and even make them grateful for his presence. - redefines position by saying if necessary to observe out of license don't write them up; shift responsibility to department chairmen when discussion doesn't follow his predetermined plan. - gradual reduction in vehemence of his demands.

OBSERVED BEHAVIOR	THEORETICAL INFERENCES	INDIVIDUAL AGENDAS	SOCIAL VARIABLES
- reputation as outspoken opponent of administration - agree/disagree	- effort to minimize her reputation - possibility of trying to be objective, judging all cases on individual merits	- to cooperate whenever possible - to be vocal at all meetings; maximum input at every opportunity.	- apparently felt very qualified in her own field; possibly felt she could afford to "give in on this point"

Glossary

This glossary is a listing of some of the terms used in these materials. Some readers may be new to the way social scientists conceptualize their problems--by collective consensus. What is meant by a "norm" or a "role" is a definition mutually agreed upon by social scientists. Yet, as in organizational behavior, deviances do occur. The definitions below should not be taken as universally accepted. Rather, they are what the people who did the research and wrote these materials meant when they used the terms "norm", "role", etc. In any event, these definitions are close enough to what is commonly accepted that the reader of this report should have no problem transferring these conceptual definitions to other literature that uses the same words.

assimilation: the process by which the cultural and social patterns of one group are absorbed into the cultural and social patterns of another group .

autonomy: domains of behavior which individuals and groups create for themselves in organizations and spend much of their time trying to maintain in order to establish their own agendas for action.

bureaucracy: a form of organization based on the rationalization of behavior through fixed roles, hierarchical division of authority, impersonality, and efficiency. Historically, the writings on this form of organization have been associated with Max Weber.

category: a collection of individuals not necessarily participating in the same activity but sharing some common trait, variable or criterion by which they can be differentiated.

emergent role: roles not formally specified which arise in response to the changing needs and problems of the organization.

ethnicity: a set of norms, patterns, and behavior associated with a specific group often characterized by having some nationality or racial typing in common.

event analysis: analysis of status and roles, formal and emergent, interacting at a given point in time in a particular social setting. This method is also sometimes referred to as Critical Incident Technique (C.I.T.).

formal organization: a collection of statuses or positions specified in writing or some other document gathered together for the achievement of some particular purpose or goal(s).

formal organization chart: the graphic representation of positions and lines of authority within an organization.

formal role: those roles explicitly and publicly recognized by people in the organization and which are clearly related to the goals of the organization.

group: a collection of individuals participating in the same activity; a form of category with purposive entity.

human relations theory: a theory of administration developed in the late 1930's and early 1940's which attempted to solve problems of management by use of research findings developed from studies of the informal aspects of organization.

informal organization: all patterns of interaction, particularly personal relations of people in an organization not written down or described by the formal organization chart.

institutionalize: the process by which norms, statuses and other forms of structure become internalized.

network: an association of persons or a system of links joining a set of particular individuals.

network chart: the graphic representation of a network.

norm: a standard of behavior mutually agreed upon by members of a social group which specify acceptable or unacceptable behavior for the members of that group.

organic: a form of organization characterized by personalization of relationships.

primary group: a collection of individuals, associated with any one person, characterized by close and frequent interaction.

role: the individualized behavior of a person holding a specific status.

role-set: the collection of roles associated with any given status.

scientific management theory: a theory of administration founded by Frank Taylor in his 1911 work The Principles of Scientific Management which attempted to solve the problems of management through the development of specific scientific principles.

SES: abbreviation of socioeconomic status which is a form of stratification based on social and economic criteria.

social distance: the psychological (and/or physical) separation between any two or more individuals within an organization.

social organization: the patterned mediation of interpersonal relations.

social structure: a patterned form of interaction which exists over time. (A collective of related social structures functions as a social system.)

sorting: a form of behavior by which people organize themselves into categories or groups.

status: 1. a specified position within a social organization;
2. a social level or hierarchical position within a social system.

stereotype: an expected form of behavior projected upon the inhabitant of generic statuses which may or may not have a factual basis in reality.

stratification: the hierarchical order of statuses based upon some given criterion or set of criteria.

territoriality: the geographic expression of sorting out patterns whereby sorted groups are found to occupy differentiated realms of physical (and/or psychological) space.

total institution: a form of organization characterized by 24 hour maintenance of the participants with barriers to the outside. Conceptually, originated in the writings of Erving Goffman.

Glossary of Verbs Used in Instructional Objectives

analyze: break a situation into its component parts so that the relationships and interactions among the parts are made explicit.

compare: identify similarities among elements.

create: produce or combine elements into a new structure.

describe: recall and state the essential characteristics of an object or event.

discuss: a conversation between two or more individuals about a given topic.

distinguish [differentiate, contrast]: identify differences among elements.

evaluate: judge in terms of specific criteria.

explore: list alternatives and speculate about their origins, interpretations, and interrelationships.

identify: indicate membership or non-membership of specific objects, characteristics, or events in a class when the name of that class is given.

speculate: arrive at tentative conclusions based on incomplete information.

Suggested Instructor Readings

In addition to the assigned readings for students, there are a number of articles on the theory and methods of field research which we felt might be helpful for the instructor and could also be assigned to students who are interested in additional readings. These are as follows:

Primary

Page

Diesing, Paul. "Types of Methods," Patterns of Discovery in the Social Sciences. Chicago: Aldine, 1971. 71

Blumer, Herbert. "The Methodological Position of Symbolic Interactionism." In Symbolic Interactionism. Englewood Cliffs: Prentice-Hall, Inc., 1969. 71

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Everhart, Robert B. "Problems of Doing Fieldwork in Educational Evaluation," Human Organization, Vol. 34, 1975. 212

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Vidich, Arthur and Bensman, Joseph. "The Validity of Field Data," Human Organization, Vol. 13, 1954. 251

Lazarfeld, Paul F. and Barton, Allen H. "Qualitative Measurement in the Social Sciences: Classification, Typologies, and Indices." In Lerner and Laswell (eds.), The Policy Sciences. Stanford: Stanford University Press, 1951. 286

Argyris, Chris, "Applicable and Applied Behavioral Science." In The Applicability of Organizational Sociology. Cambridge: Cambridge University Press, 1972. 287

Denzin, Norman K. The Research Act. Chicago: Aldine Publishing Company, 1970. 288

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